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Report Highlights:

The Colombian Hotel Restaurant and Institutional (HRI) sector is dealing with higher costs, new regulations such as the labor reform, and changing customer tastes, which are especially challenging for small businesses. Even with these constraints, the industry remains optimistic thanks to growing tourism and expectations around the upcoming 2026 FIFA World Cup. In 2024, Colombia remained the sixth largest destination for U.S. agricultural exports, reaching \$4.4 billion, a 19 percent increase from 2023. U.S. exporters can capitalize on Colombia's growing middle class and demand for healthy, sustainable products by building relationships with importers, participating in trade shows, and adapting to local consumer preferences.

Executive Summary:

In 2024, Colombia remained the sixth largest global export market for U.S. agricultural products, with total U.S. ag exports reaching \$4.4 billion, a 19 percent increase from 2023. Colombia's GDP in 2024 increased by 1.7 percent to \$419 billion, positioning the country as the thirty-ninth largest economy in the world and the fourth largest in Latin America.

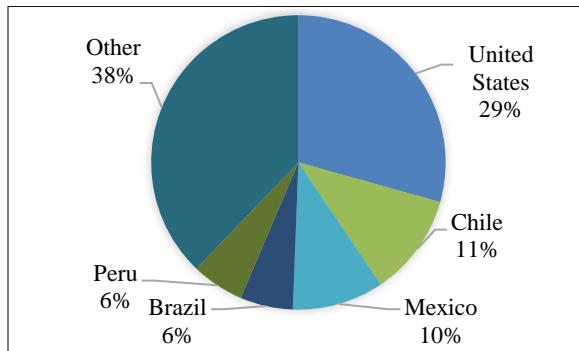


Chart 1: Top Exporting Countries to Colombia (by value)

Data source: Trade Data Monitor (TDM)

Food Retail Industry:

According to Euromonitor, Colombia's retail food sales increased 12 percent in 2024, fueled by growth mainly among hard discounters. The retail market is dominated by mom-and-pop stores (47 percent) and discounters (18 percent).

Food Processing Industry:

Colombia is a net importer of many food ingredients. According to Colombia's National Business Association (ANDI), Colombia's food industry is comprised of 45,000 registered companies and approximately 98 percent of them are small and medium-sized businesses. Although the food industry focuses on the local market, it still exports to 140 countries. Food processing represents 29 percent of Colombia's total manufacturing.

Food Service Industry:

According to the Colombian National Administrative Department of Statistics (DANE), Colombia's lodging and restaurant sector increased 6 percent in 2024. This growth is driven by tourism. The Colombian food service industry is expected to experience moderate growth in 2025 and 2026, due to increasing labor costs coming from the recent labor reform.

Quick Facts CY 2024

Imports of Consumer-Oriented Products (US \$2.9 billion)

Top 10 Growth Products in Colombia, 2023 to 2024

1) Roasted chicory and other coffee substitutes	2) fresh orange juice
3) Prepared/preserved strawberries	4) Prepared/preserved pears
5) Not defatted cocoa paste	6) Fresh/dried ginseng roots
7) Fresh/dried hazelnuts	8) Rose bulbs
9) Meat offals	10) Frozen boneless meat of sheep

Sales by Channels (U.S. billion)

Retail Food Industry*	\$54
Food Service-HRI	\$17
Food Processing	\$13
Food and Agriculture Exports	\$12

*Euromonitor

Top 10 Host Colombian Retailers (based on sales)

1 Koba Colombia (D1)	2 Grupo Exito
3 Jeronimo Martins Colombia (Ara)	4 Olimpica
5 Cencosud	6 PriceSmart
7 Supertiendas Cañaveral	8 Oxxo
9 Mercado Zapatoca	10 Supervaquita La 33

GDP/Population

Population (millions): 52.7

GDP (billions USD, current prices): \$418.6

GDP per capita (USD, current prices): \$7,943.9

Sources: DANE, TDM, GATS, Central Bank, IMF, Fenalco, local media outlets

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
<ul style="list-style-type: none"> - Diverse retail market - Zero or low tariffs for U.S. agricultural exports under free trade agreement - Four major ports on Caribbean and Pacific 	<ul style="list-style-type: none"> - Deficient infrastructure - Political and economic uncertainty
Opportunities	Threats
<ul style="list-style-type: none"> - Growing middle class - Growing demand for consumer-oriented products 	<ul style="list-style-type: none"> - New nutritional regulations/health taxes

Section I: Market Summary

In 2024, Colombia became the sixth largest destination for U.S. agricultural exports, which reached \$4.4 billion in 2024. Top U.S. agricultural exports in 2024 by value included corn, soybean meal, ethanol, pork, and pork products. Top competitors with U.S. agricultural exports to Colombia are Brazil, Ecuador, Canada, and Chile. Since the U.S.-Colombia Trade Promotion Agreement (CTPA) was implemented in 2012, U.S. agricultural exports have grown over 300 percent. The CTPA immediately eliminated over 80 percent of all agricultural tariff lines, and all remaining tariffs will be phased out by 2030. The free trade agreement has helped the United States become the top supplier of agricultural exports to the country. More detailed information about its benefits to U.S. agriculture is available here: [US Agricultural Exports to Colombia Reached Record High in 2024](#).

Despite its economic challenges, food service sales in Colombia grew in 2024, increasing by six percent to \$17 billion (according to DANE). The HRI sector remains highly informal in Colombia, though urbanization, increasing dual income households, and a growing flow of tourists is driving expansion in the sector and formalization. Business tourism is on the rise and private organizations, led by the Colombian Ministry of Commerce, Industry, and Tourism, are working for consolidating Colombia as a regional leader for corporate tourism. Major Colombian cities are strengthening their reputation as top tourist and business destinations such as Bogota, Medellin, Cartagena, and Barranquilla. Foreign visitors mainly come from the United States, Mexico, and countries in South America. In 2024, Colombia imported \$2.9 billion of consumer-oriented food products. The United States was the top supplier.

The [Food Processing Ingredients GAIN Report](#) and the [Retail Foods Annual GAIN Report](#) provide further data and analysis on the Colombian market. The [2025 Investment Climate Statements: Colombia](#) provide further information about the country's economic and political environment.

Table1: Advantages and Challenges

ADVANTAGES	CHALLENGES
The CTPA provides preferential product treatment for almost all U.S. agricultural exports.	Colombia has trade agreements with many other countries, increasing competition with U.S. products.
The United States holds a reputation for producing high-quality agricultural products.	Colombian per capita consumption of processed products is still relatively low compared to other countries in the region.
Increased acceptance of American style restaurants provides an avenue for introducing U.S. recipes and food ingredients into the Colombian diet.	The Colombian peso exchange rate fluctuations increase uncertainty and affects purchasing decisions from importers.
Growing tourism increases demand for raw materials and ingredients.	There is an overarching cultural perception that frozen and canned food products are unhealthy and lack quality.
Growing middle-class and urbanization stimulate new consumer trends and increase processed foods sales.	Internal transportation costs from ports of entry are high due to difficult geography and poor infrastructure.
The market for healthy products is growing.	The cold chain is underdeveloped and deficient, increasing logistical costs.
U.S. food suppliers and manufacturers have a good reputation in terms of food safety, availability, quality, and delivery.	New nutritional regulations are difficult for international companies to meet, including front-of-package labeling rules and sodium content requirements.

Section II: Roadmap for Market Entry

○ *Entry Strategy*

Any U.S. exporter seeking to enter the Colombian market for the first time should start with market research to better understand competitors, consumer preferences, and the business environment. Exporters must understand Colombian standards and regulations to avoid clearance delays at ports of entry. Colombian buyers value exporters that are willing to send samples and provide detailed product information. Critical steps for market entry include the following:

- Build relationships with large importers and wholesalers/distributors;
- Highlight social responsibility in marketing techniques;
- Develop ways to meet the needs of the Colombian market, ideally through personal visits, to have a greater understanding about the market and identify needs of buyers and developing trends;
- Consider consolidation when exporting small amounts of product;
- Develop business relationships with top executives (i.e., marketing directors, and purchasing managers);
- Exhibit in the U.S. pavilion at the USDA-endorsed trade show [Alimentec](#), June 9-12, 2026 in Bogota;
- Participate in other local trade shows and/or food festivals, such as [Agroexpo](#) and [Expo IAimentos](#), to learn about consumer trends;
- Participate in U.S. trade delegations such as those led by USDA or the State Regional Trade Groups;
- Attend trade events in the United States like the [IFT Event and Expo](#), [National Restaurant Association Show](#), [Sweets and Snacks Expo](#), or [Americas Food and Beverage Show](#), which provide opportunities to meet and educate Colombian importers;
- Develop marketing/communication materials in Spanish;
- Work closely with local importers to comply with food import regulations to facilitate the registration and import of food products and minimize port of entry risks; and
- Support the importer with promotional campaigns, which can sometimes be supported by the USDA Branded Program.

For more information on doing business in Colombia, see [Colombia Country Commercial Guide](#).

○ *Market Structure*

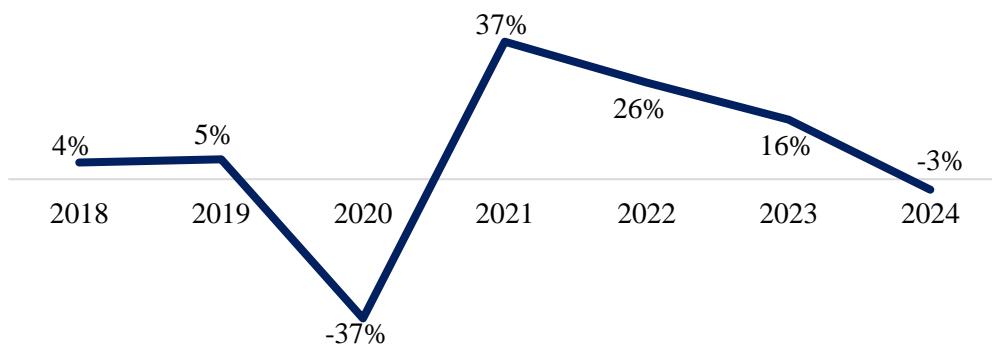
According to DANE, Colombia's accommodation and restaurant sales reached \$17 billion in 2024, a 6 percent increase from 2023. Based on Euromonitor's information, the HRI sector consists of 118,000 restaurants, cafés, bars, cafeterias, and kiosks, and 10,000 hotels. According to DANE and the Bogotá Chamber of Commerce, restaurants, hotels, and lodging services consistently show high concentrations of informal employment, driven by the sector's need for flexibility, limited capital, and scarce alternative job opportunities. In 2024, over 6,900 restaurants closed due to these challenges. Although urbanization, growing number of shopping malls and food courts, increasing dual income households, higher participation of women in the labor force, and growing flow of tourists are major drivers of HRI expansion, most Colombians still link the experience of dining-out with celebrations.

A labor reform recently approved by Colombia's Congress has had a strong impact on the HRI sector by expanding worker protections, including raising night and holiday pay. The industry is working to adjust work schedules, hire staff who can do different tasks, change opening hours, and focus more on delivery

services. It is expected that small businesses will find it difficult to pay higher costs, resulting in closure of more outlets.

While the [Colombian Hotel and Tourism Association \(COTELCO\)](#) and the Colombian Association of Restaurants (ACODRES) point to lower occupancy rates and high inflation as key challenges to expanding growth, the HRI sector is dealing with changing consumer consumption patterns and economic challenges by expanding digital platforms and developing tools not just for delivery services, but also for customer service management. In response to growing consumer concerns over sustainability, restaurants and hotels are increasingly offering seasonal menus that source local products. They are also combining these efforts with offering plant-based and low fat/sugar/gluten-free products to consumers who are increasingly requesting foods designed to their preferences and dietary restrictions.

Figure 1: Food Service¹ Sales in Colombia – Average Annual Growth (%)



Data Source: Euromonitor

Restaurant chains are well established and recognized by consumers. They have benefited from their standardized menus and formats, providing confidence to consumers who know what to expect. Independent brands offer a wide variety of options and innovative menus, including non-traditional ingredients and flavors from other cultures. For independent brands, Colombians are willing to pay more. Small informal restaurants, which are often preferred by workers and students, are found all over the country.

According to ACODRES, the market share of independent outlets is close to 95 percent. Some American restaurant and fast-food chains present in the market are [Burger King](#), [Dunkin' Donuts](#), [Hard Rock Café](#), [Hooters](#), [McDonalds](#), [Subway](#), [KFC](#), [Domino's](#), [Papa John's](#), and [Starbucks](#). Main local restaurant chains are [Frisby](#), [El Corral](#), [Crepes & Waffles](#), and [Archie's](#).

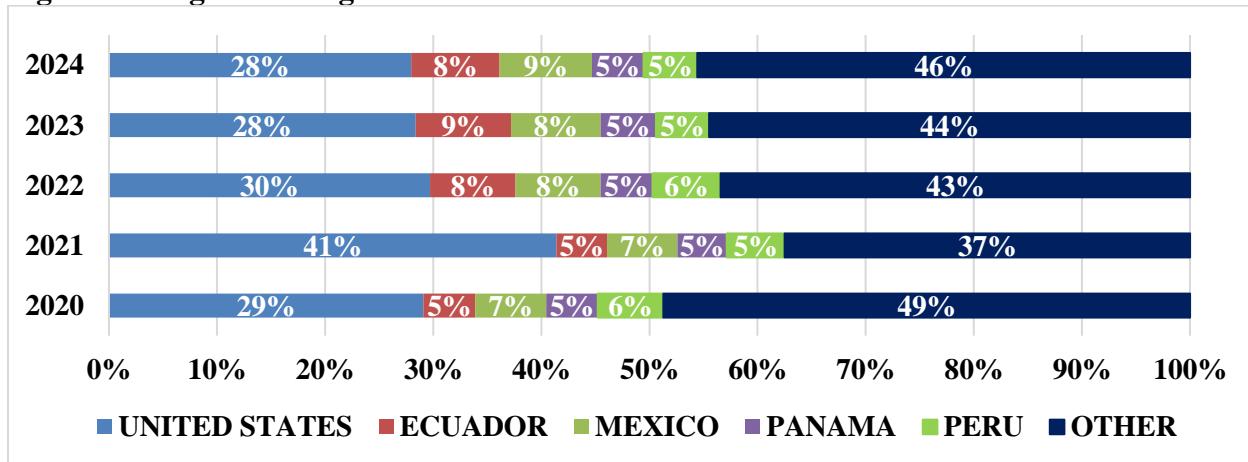
¹ Food service includes cafés/bars, full-service restaurants, limited-service restaurants, self-service cafeterias, and street stalls/kiosks

Table 2. Main Restaurant Chains in Colombia - 2024

Company	Sales (\$ million)	Outlets	Website
Frisby	\$238	281	https://frisby.com.co/
Crepes & Waffles	\$194	216	https://crepesywaffles.com/
Arcos Dorados (McDonald's)	\$186	300	https://www.mcdonalds.com.co/
Promotora de Café (Juan Valdez)	\$186	375	https://juanvaldez.com/
IRCC (El Corral)	\$182	215	https://www.elcorral.com/

The country's hotel supply includes hotels that are chains, boutique, independent, and marketed as ecofriendly. The main travel motivations for Colombians are leisure (58 percent) and business (35 percent). In 2024, foreign visitors were mainly from the United States (28 percent), Mexico (9 percent), Ecuador (8 percent), Peru (5 percent), and Panama (5 percent).

Figure 2: Origin of foreign visitors to Colombia



Source: Ministry of Commerce, Industry and Tourism (MINCIT)

Inflation continues to be a concern for the HRI industry as food prices² continue to be on the rise, affecting lodging and restaurant prices³. Consumers are very sensitive to price changes. Therefore, small restaurants have adapted their menus and portion sizes to mitigate inflation effects.

- ***Distribution***

Only big restaurants and hotel chains directly import food and beverages. Other smaller businesses purchase inputs from importers and/or distributors. Companies such as [La Receta](#), [Unilever Food Solutions](#), and [Makro](#) have specialized in supplying food and beverages to the HRI industry. Some other companies such as [Estrena Tienda Horeca](#), [Restit](#), [Natural Foods](#), and [JDH Distribuciones](#) have strengthened their online presence to supply products to the food service sector.

² 2024 food and non-alcoholic beverage inflation reached 12.15 percent (DANE)

³ 2024 restaurant and hotel inflation reached 16.30 percent (DANE)

Table 3: Some Colombian Food Service Suppliers

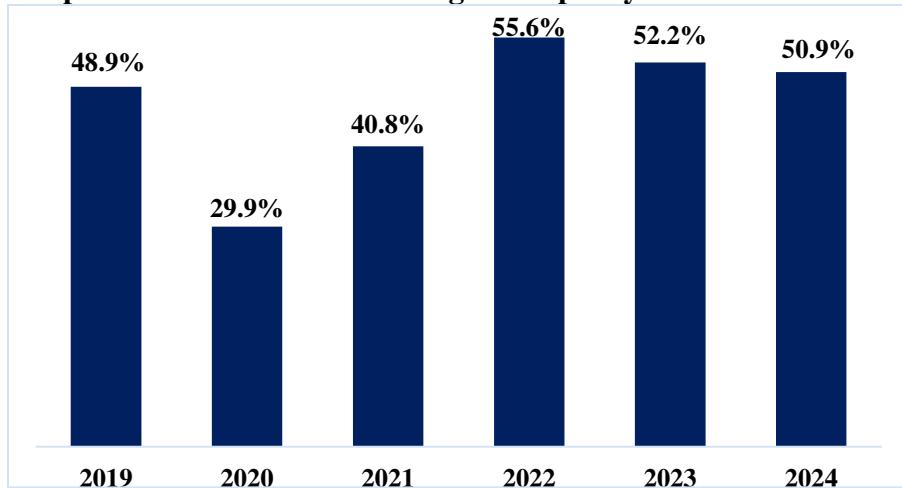
Beef, pork and poultry	Foodbox Meico Atlantic La Fazenda Cervalle Bucanero MacPollo	Dairy	Alpina Colanta Alqueria
Alcoholic beverages	Dislicores Bavaria Nacional de Licores	Seafood	Ancla y Viento Antillana Atlantic
Condiments	El Rey Natucol	Pulses	Dicomer Granos y Cereales La Perla SuDespensa

- **Hotels**

COTELCO supports its members and represents the industry's interests to the government. While increased domestic consumption following the COVID-19 pandemic contributed to the sector's recovery, hotels now face challenges as slower demand signals a decline in local tourism. In fact, the domestic survey on tourism developed by DANE concluded that 63 percent of Colombians did not travel in the first 2024 quarter due to economic concerns.

According to COTELCO, the hotel sector faced difficulties in 2024, with hotel occupancy falling to 50.9 percent and a 7.8 percent drop in jobs, mainly due to a 19 percent value-added tax (VAT) on hotel services, which negatively affected demand and competitiveness against other tourist destinations and informal lodging services.

In 2024, hotel restaurants in Colombia stand out for offering luxury experiences and haute cuisine, with recognitions such as the award given to Jairo at the W Bogotá—considered the best hotel restaurant in the country for its fusion of national tradition and international techniques—and the prize awarded to Basilic for its local menu. These trends reflect a strong focus on native ingredients, regional diversity, and sustainability.

Graph 3: Colombia Hotel Average Occupancy Rates

Source: DANE

Most hotels in Colombia are family businesses, although there are some international chain hotels and resorts. Main international chain hotels and resorts present in Colombia are [NH Hotel Group](#), [Decameron Hotels & Resorts](#), [GHL Hotels](#), [Hilton](#), [Accor](#), [Marriott](#), [Hyatt](#), and [Best Western](#).

- **Restaurants**

The market share of unregistered, informal restaurants is up to 77 percent of the market, which is the main threat facing the sector. The past performance in the restaurant sector is primarily due to growth in the tourism sector and rising household incomes. Quick service and fast-food restaurants are strategically located around working areas and represent one-third of the restaurant market.

The convenience of fast-food restaurants supports dual income, working households that have little time to prepare traditional meals on a moderate income. Preferred foods for Colombians when eating-out are chicken, hamburgers, and crepes. In addition to Colombian preferences for fast-food restaurants, consumers have a growing affinity for fast casual restaurants where they can find higher quality food at affordable prices. Main restaurant operators that offer fast-food include [Frisby SA](#), [Hamburguesas El Corral](#), and [McDonald's Corp.](#)

Consumer demand for healthy food has resulted in new menu offerings such as plant-based proteins, and low-fat and sugar-free options. Additionally, food waste management is now more relevant for the sector since it represents a growing consumer concern along with social responsibility and sustainability practices. Some restaurants that highlight their social responsibility are [Wok](#) and [Crepes & Waffles](#).

According to Euromonitor, restaurant, catering, and bar service sales grew 17 percent in 2023. ACODRES emphasized that this reactivation did not translate to full recovery since high food inflation diminished profits, hurt employment generation, and resulted in higher prices for final consumers. Informal restaurants are expected to see an increase in market share since they offer more affordable meals and consumers are highly sensitive to price changes.

- **Institutional Sector**

Schools: According to DANE, approximately 24 percent of the Colombian population is of school age, between 0 and 14 years old. Most schools contract with catering companies to serve lunch versus preparing food on-site. Foods prepared at schools are purchased wholesale at establishments specializing in food services for schools. Sales of imported products for this purpose are not significant; however, there is potential for growth in U.S. consumer-oriented products, such as fruits, beverages, and nutritional snacks. There are regulations that require public school food service providers to procure at least 30 percent of food from small farmers.

Table 4: Some Colombian Companies in Food Service for Schools

Mr. Food Happy Eating	Goddard Catering Group	Food Services de Colombia
Sapore	Servinutrir	Ibeaser
Alimentos Colomer	Compass Group	Restaurantes Serviexpress

Colombian Government Programs: The government of Colombia sponsors several programs aimed at improving nutritional standards for children attending public schools and addressing child malnutrition in low-income families. The food assistance programs provide a nutritionally balanced lunch supplement and reach approximately 6 million school age children, nursing mothers, the elderly, and

homeless. [The Colombian Family Welfare Institute \(ICBF\)](#) and all regional educational offices implement food assistance programs. Program implementers source high-nutritional and low-price food products, including pulses, rice, wheat and corn flours, and fruits. By regulation, these programs should source at least 30 percent of the food from small farmers.

Social and Country Clubs: There are almost 80 high-end social clubs in Colombia, offering sports facilities and restaurant opportunities. Most of them are in Bogota, Medellin, Cali, and Barranquilla. Social clubs are a good market for upscale imported food products. Social and country clubs source their food and beverages stocks from specialized food service establishments and importers of fine foods and wines.

Section III: Competition

Colombian imports of consumer-oriented products from all suppliers totaled \$2.9 billion in 2024. Main competitors for U.S. consumer-oriented products in the country are Chile, Mexico, and Brazil. These countries also have free trade agreements with Colombia. More information on Colombia's free trade agreements and current negotiations available at [FTA-Colombia](#).

Table 5: Main competitors to U.S. suppliers - Consumer-oriented products imported by Colombia

Category	Value (\$ million)	U.S. market share	Main Competitors
Pork and pork products	\$449	76%	Canada: 13% Chile: 8% Spain: 2%
Soup and other food preparations	\$323	24%	Peru: 14% Mexico: 11% Brazil: 11%
Dairy products	\$307	40%	Chile: 10% Mexico: 9% Bolivia: 7%
Fresh fruit	\$239	8%	Chile: 55% Peru: 17% France: 5%
Processed vegetables	\$211	8%	Belgium: 37% China: 12% Netherlands: 10% Chile: 10%
Distilled spirits	\$156	4%	United Kingdom: 53% Mexico: 24% Italy: 9%
Bakery goods, cereals and pasta	\$128	11%	Peru: 29% Italy: 16% Mexico: 10%
Dog and cat food	\$121	36%	Brazil: 35% Mexico: 14% France: 5%
Poultry meat and products	\$85	85%	Chile: 15%
Wine and related products	\$82	2%	Chile: 37% Spain: 16% Argentina: 16%

Data Source: TDM

Section IV: Best Product Prospects

Table 6: Top Consumer-Oriented Products Imported by Colombia from the World (\$ million)

Product	2020	2021	2022	2023	2024	Change 2023/24
020329 Frozen meat of swine	\$136	\$255	\$273	\$300	\$398	33%
210690 Food preparations	\$220	\$253	\$293	\$280	\$313	12%
080810 Fresh apples	\$95	\$100	\$100	\$109	\$136	25%
240220 Cigarettes containing tobacco	\$105	\$102	\$114	\$117	\$122	5%
230910 Dog and cat food	\$64	\$89	\$118	\$107	\$121	13%

Data Source: TDM

Table 7: Top Consumer-Oriented Products Imported by Colombia from the United States (\$ million)

Product	2020	2021	2022	2023	2024	Change 2023/24
020329 Frozen meat of swine	\$130	\$210	\$218	\$238	\$324	37%
210690 Food preparations	\$58	\$68	\$74	\$66	\$76	15%
020714 Frozen chicken cuts and edible offal	\$67	\$93	\$83	\$48	\$62	28%
040210 Milk powder, fat content not exceeding 1.5%	\$65	\$59	\$78	\$79	\$57	-27%
230910 Dog and cat food	\$31	\$41	\$52	\$43	\$44	2%

Data Source: TDM

Products Present in Market with Good Sales Potential

Colombia's imports of value-added food products from around the world are growing rapidly, especially in health food categories such as plant-based snacks and functional food products. Surveyed retailers and food importers feel there is significant potential for new products in all food categories. Organic and healthy (low sugar/fat/sodium) food products are a growing trend, and retailers are searching for the best suppliers, including private label options.

Products Not Present in Market with Good Sales Potential

Post has identified good sales potential for ingredients that substitute/replace fats, sugar, and/or sodium. Additionally, new vegetable proteins such as canola would complement the developing vegetable protein portfolio. Superfruits, such as berries, that are not present in the market have potential to gain market share, and growing demand for craft beer opens opportunities for innovation in hops to provide new product attributes.

Products Not Present in Market due to Significant Barriers

The introduction of new U.S. processed meat products can be challenging due to the decreasing number of U.S. states that can issue Certificates of Free Sale (COFS) for those products. Per Resolution 2674 of 2013, INVIMA (Colombia's FDA equivalent) requires importers to submit a COFS when registering a new food product for sale in Colombia. Colombia sets maximum thresholds of sodium for processed products through Resolution 2013 of 2020 and Resolution 2056 of 2023, impeding imports of high-sodium content products such as seasoned butter, specialty cheese, and deli meats. Additionally, exporters interested in selling to Colombia are advised to review nutritional and labeling regulations, especially for processed products and meat. Colombia applies a healthy tax of 20 percent to processed products high in sugar, salt/sodium, and fats. Products subject to healthy taxes are listed in Law 2277, 2022. For further information, visit [FAIRS Annual Country GAIN Report](#).

Section V: Key Contacts and Further Information

Government sources for data

[Colombian Department of Statistics \(DANE\)](#)

[Colombian Central Bank \(Banrep\)](#)

Government regulatory agency contacts

Phytosanitary and Zoosanitary Requirements	Food Product Registration and Health Permits
<p>Ministry of Agriculture and Rural Development ICA (APHIS counterpart) Viviana Sofia Zamora Deputy Manager Animal Health Protection Tel. +57-601-7563030 ext. 3201 e-mail: viviana.zamora@ica.gov.co</p> <p>Luis Gerardo Arias Deputy Manager Plant Health Protection Tel: +57-601-7563030 ext. 3101 e-mail: luis.ariasr@ica.gov.co</p>	<p>Ministry of Health and Social Protection INVIMA (FDA counterpart) Alba Jimenez Director Division of Food and Alcoholic Beverages Phone: +57-601-7422121 Ext. 4001 e-mail: ajimenezt@invima.gov.co</p>

Ministries responsible for food policies and import policies

Customs Clearance National Tax and Customs Directorate (DIAN) attached to the Ministry of Finance and Public Credit	Import-export operations Ministry of Commerce, Industry and Tourism (MINCIT)
Food Product Registration and Health Permits Ministry of Health and Social Protection	Phytosanitary and Zoosanitary Requirements Ministry of Agriculture and Rural Development

U.S. Embassy in Colombia

Website	Social media channels	
U.S. Embassy in Colombia	X Facebook Instagram	Youtube Flickr LinkedIn

List of trade associations

ACODRES ANDI CHAMBER OF FOOD	COTELCO
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Agricultural Affairs Office

Phone: +(57) 601-275-4622

Physical Address: Carrera 45#24b-27

Email: AgBogota@fas.usda.gov

<http://www.fas.usda.gov>

Attachments:

No Attachments